

ORACLE®

License Management Services

Vorstellung Oracle License Management Services (LMS)

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AGENDA

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- 3 What does this mean to you
- 4 Our approach to Tools
- 5 Why and how to work with LMS
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Introduction

Managing Complexity

Your challenges

We understand that maintaining oversight of your Oracle assets can be a challenge, but can produce the following strategic benefits:

- More cost-effective management of your infrastructure and IT resources
- Gain a solid platform to drive business transformation initiatives
- Make better informed business strategy and IT investment decisions
- Avoid the risks and unscheduled costs that come from unexpected audits
- Ensure you are deriving the maximum value from your Oracle investment

Managing Complexity

Licensing challenges – a question of cause and effect

Cause

- 1 Business Investment**
 - IT remains a major component of the overall financial budget
- 2 Business Demand**
 - Delivering new capabilities is essential to remaining competitive
- 3 Uncoordinated Spend**
 - IT deployment still remains a process lacking any central integration
- 4 Excessive Complexity**
 - Caused by IT consolidation, M&A, outsourcing and multiple licensing rules

Effect

- 1 A Lack of Control**
 - The result is a lack of visibility and actionable insight into the IT estate
- 2 The Result**
 - Unmitigated risk, unscheduled cost, restricted it efficiency
- 3 Business Impact**
 - Poor use of IT and financial resources, unscheduled audits and unplanned costs

What complexity means to you

The impact on the license estate – inefficient IT

Executives are denied detailed insights into the condition of their Oracle deployments

There is a risk of falling out of compliance and unscheduled liabilities

Financial resources are used inefficiently - ROI from IT spend reduced & future investment plans compromised

IT resources are used inefficiently - both in the actual licenses and how your people manage them



Who are LMS

Establishing a Global Purpose

Mission

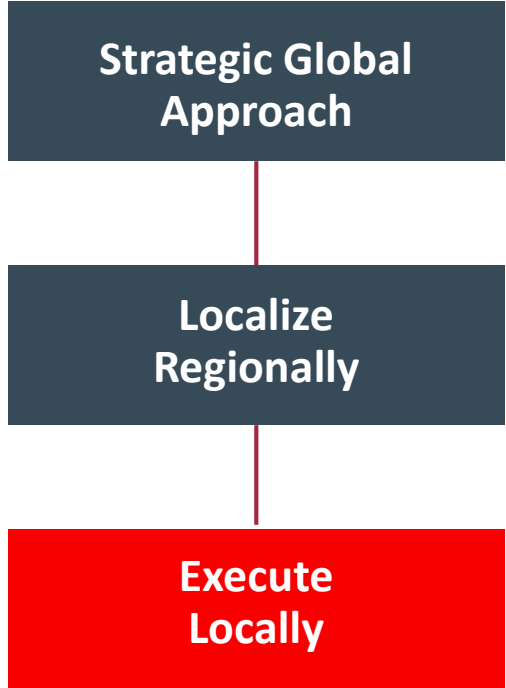
What we do

Promote management, governance and awareness over the proper use and distribution of Oracle systems through expert services.

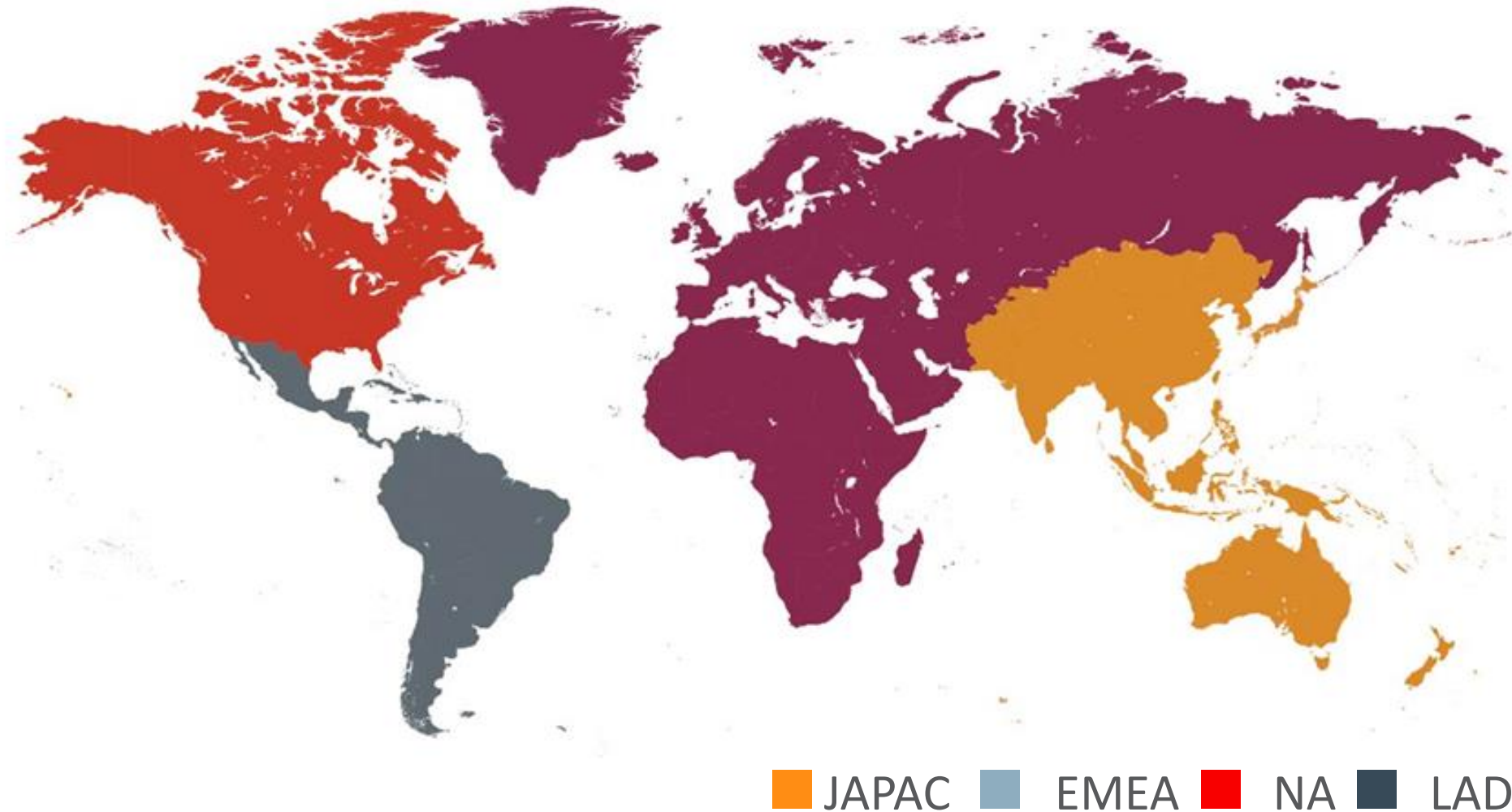
Vision

What we aspire to

To be the most respected business partner for compliance and Oracle asset management practices worldwide.



Global Overview



Snapshot: License Management Services



Operating in 114 countries.

15,000+

Customers per year.



450 people globally.
Global reach,
local resources.



Expert services and
best practices.

A Proactive Partnership

- Partnership
 - you've made a significant investment in Oracle and we want to make a significant investment in you
- Strategic
 - we will help you drive strategic value from your license management
- Proactive
 - we will support you in introducing proactive monitoring and measuring of your license estate to drive greater efficiency in your IT

Reducing Complexity

- **Educate**

- guidance and best practice on managing your Oracle assets, and on wider trends in the marketplace

- **Equip**

- providing the tools and knowledge you need to create a unified understanding of license and asset entitlements for better control

- **Enable**

- supporting a more proactive approach to managing license risk, and extracting the maximum value from your investments in Oracle products

A woman with long brown hair and glasses, wearing a brown leather jacket and a blue patterned scarf, is sitting at a wooden table in a cafe. She is talking on a black mobile phone held to her left ear and looking down at an open newspaper on the table. The background is a bright, modern cafe with large windows and other people sitting at tables.

What does this mean to you?

The Strategic Benefits of LMS

LMS enables customers to:

Make better decisions about their existing Oracle estate

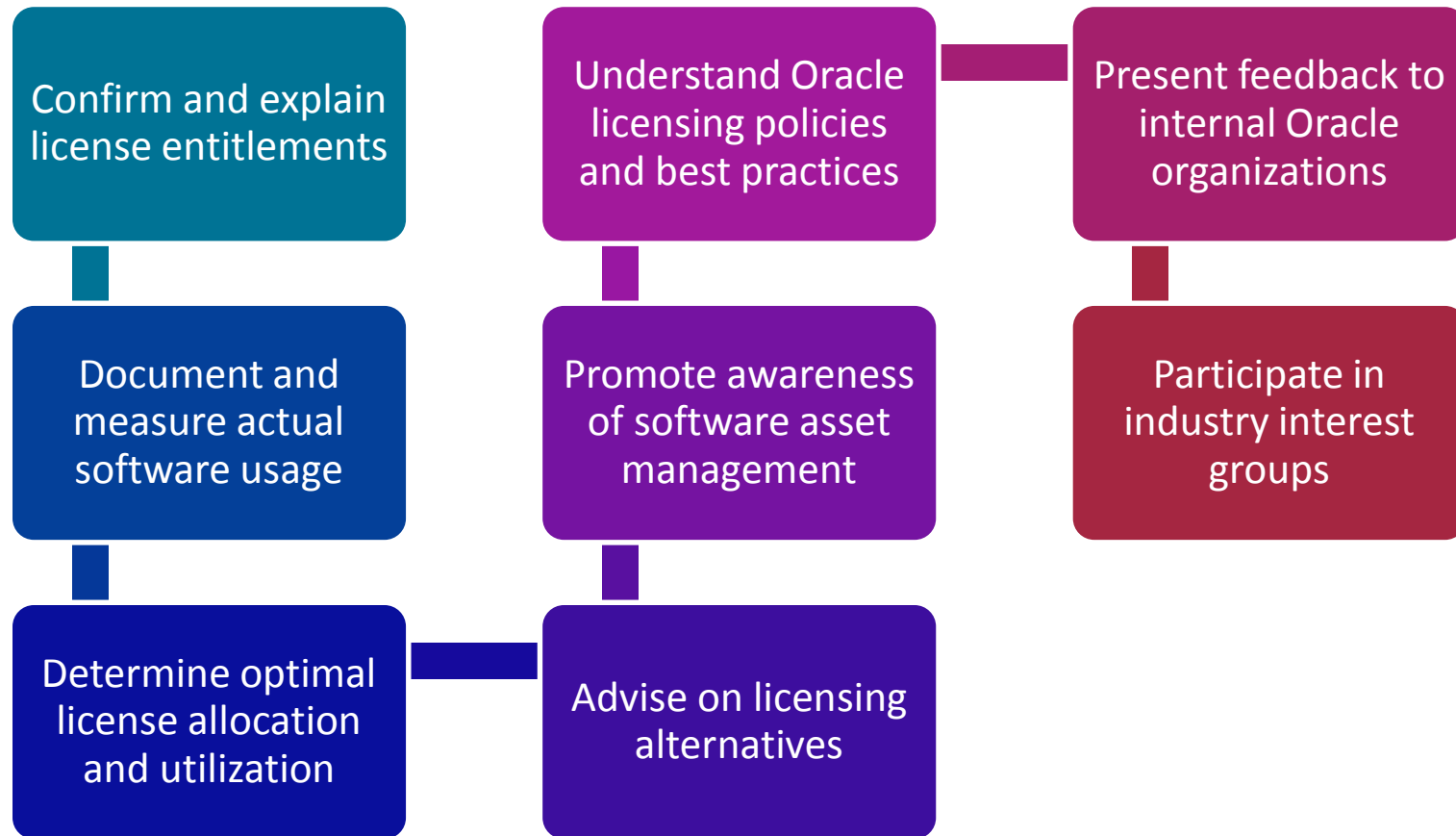
Better anticipate, predict and plan their future IT investments

Understand usage patterns and entitlements to better align IT capabilities with strategic plans

Reduce TCO and maximise their ROI from Oracle investments

The Tactical Benefits of LMS

We can help you avoid the disruption caused by unscheduled audits and the impact of unplanned financial liabilities. We will help you:



A woman with long brown hair and glasses, wearing a brown leather jacket over a blue patterned scarf, is sitting at a wooden table in a modern office. She is holding a black smartphone to her ear with her left hand and looking down at a document on the table with her right hand. The background is a bright, open-plan office with large windows and other people working in the distance.

Our approach to Tools

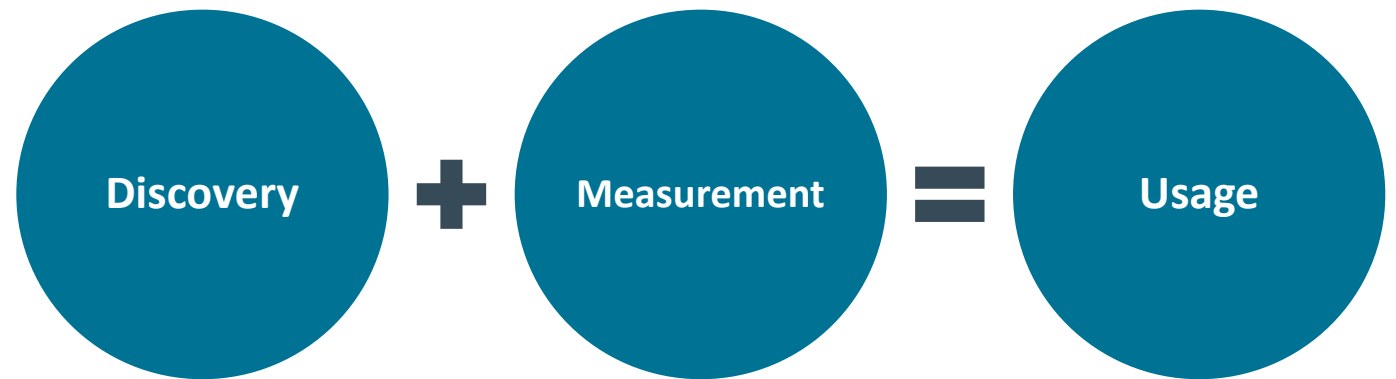
LMS Tool Strategy

The facts

What Customers want

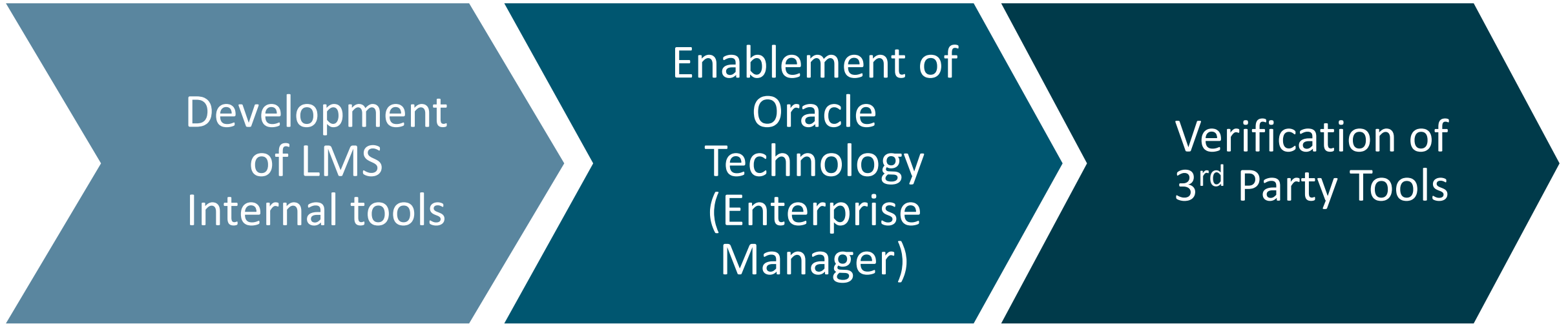


What LMS can offer



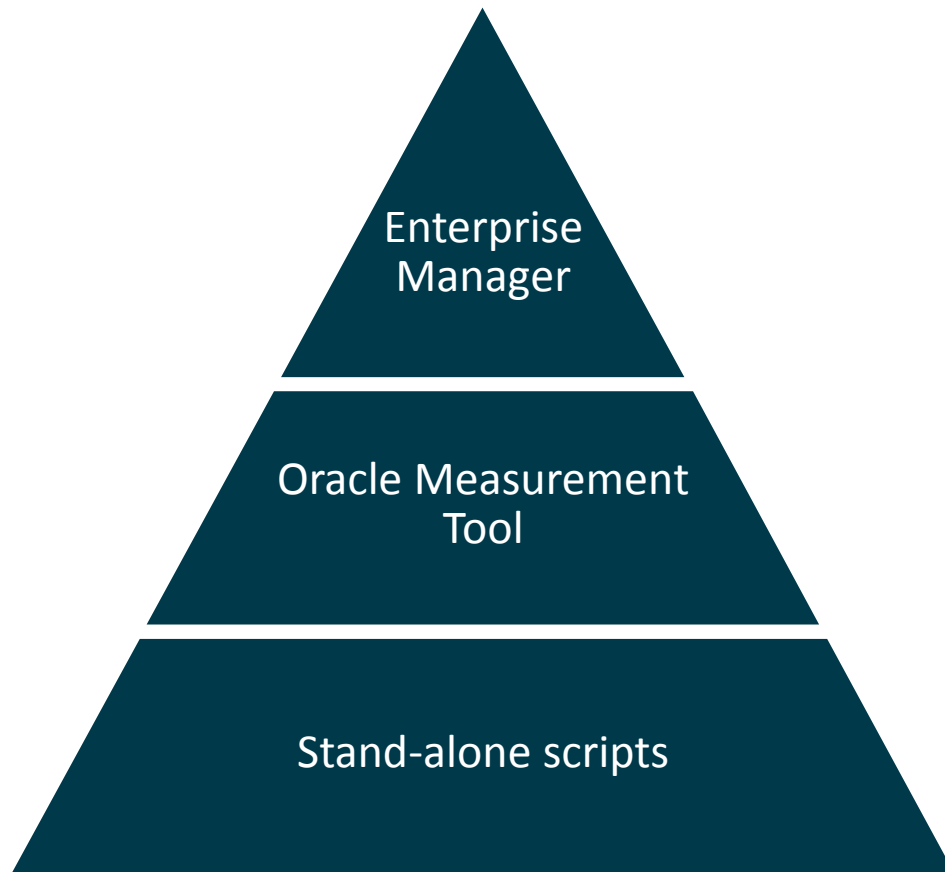
LMS' Approach to Tooling

The facts



Our Tooling Solution

Providing Choice



- Providing tooling options for customers based on their needs and environment
- Helping customers understand product deployment and usage – not a license management solution
- Educating customers to feed usage into their SAM solutions

3rd Party Tool Vendor Program

LMS Enabling customers

iQate

FLEXERA
SOFTWARE

Lime Software

nova
ratio

EASYTEAM
IT CORPORATE SOLUTIONS

hp

- Verification of 3rd party tools ability to capture deployment and usage of Oracle products. *Currently limited to DB*
- Enables customers to use one tool to track usage of products from multiple vendors
- All verified tools provide same data
- Oracle does not endorse any one vendor

A woman with long brown hair and glasses, wearing a brown leather jacket and a blue patterned scarf, is sitting at a wooden table in a meeting room. She is holding a black smartphone to her ear with her left hand and looking down at a document on the table with her right hand. The room has large windows in the background, and another person is visible sitting at a table in the distance. The overall atmosphere is professional and focused.

Why and how to work with LMS

Our Service Offerings

- **Advisory Services** Advise and education to help customers gain a complete picture of Oracle licensing - support that extends from current license entitlements to future licensing needs.
- **Contract Certification** A long term enterprise-level program that provides expertise in the utilization and risk management of Enterprise Agreements, helping you minimize risk and governance standards beyond a single point in time
- **Audit Services** A detailed evaluation of your current Oracle estate that analyzes contract entitlements, deployment practices and current utilization
- **True Up Services** True-up is aimed to provide customers an understanding of their software usages through a cooperative engagement with LMS. Customers voluntary participate in the license verification process.

LMS Key Differentiators

Why we stand out

A Truly Global Organization

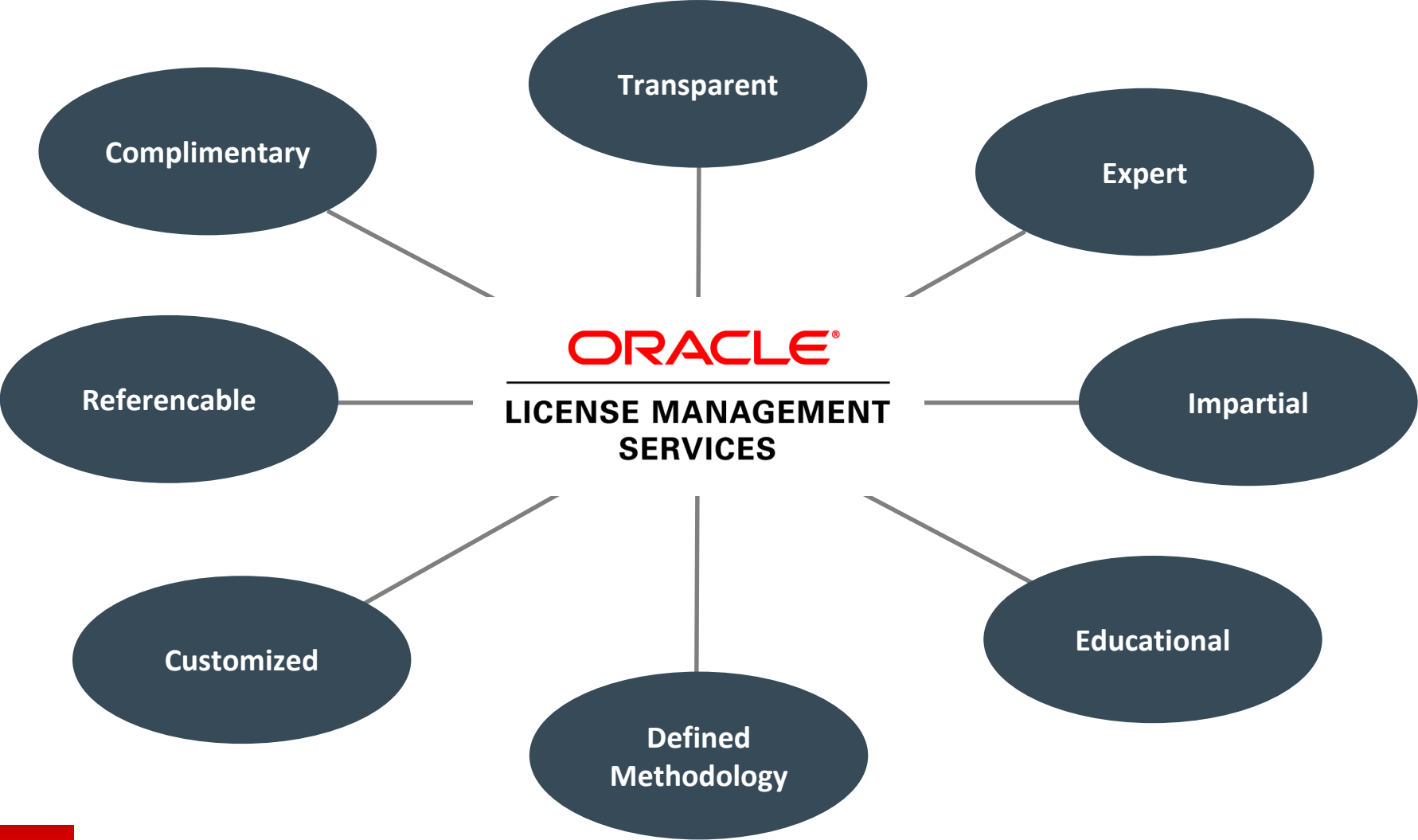
Unparalleled
insights

A commitment
to practical
outputs

Transparent
advice

The expertise to
act as strategic
partners

LMS Service Features



When To Engage With Us

1. If you are experiencing difficulties in understanding your license rights
2. If you are struggling with complex architecture and licensing scenarios
3. If you are looking to optimize license utilization and allocation
4. If licensing complexity is an obstacle to driving IT service innovation
5. If you need assistance with governance, acquisition due diligence, or new environments
6. If you are looking to move part of your Oracle estate into the cloud
7. If your organization is planning, or has recently undertaken a merger or acquisition
8. If you are looking to support a transformation initiative, reduce costs and achieve greater alignment between IT output and business demand
9. If you are considering moving to an Unlimited Licensing Agreement (ULA) or Enterprise Licensing Agreement (ELA) with Oracle
10. If you are already taking advantage of either a ULA or ELA but wish to assess current usage and ROI

Proof Points

What our customers say about us

“Oracle License Management Services helped us better understand our licenses by clearly explaining metric definitions, minimum requirements, migration paths, and licensing policies.”

Sue Camner, Database Manager, Miami-Dade County

“Oracle LMS has enhanced our understanding of Oracle’s licensing and pricing policies, made the management of our licenses simple and transparent, and eliminated risk of non-compliance.”

José Miguel Palomares Mendoza, Director of Information Technology, Caja Popular Mexicana

Proof Points

What our customers say about us

“Oracle License Management Services provided us with expertise in best practices to understand our license assets, reviewed our deployment for compliance, and built a planned approach for the ongoing management of our Oracle products.”

Ahmed Shehata, IT Director, PharmaNet/i3

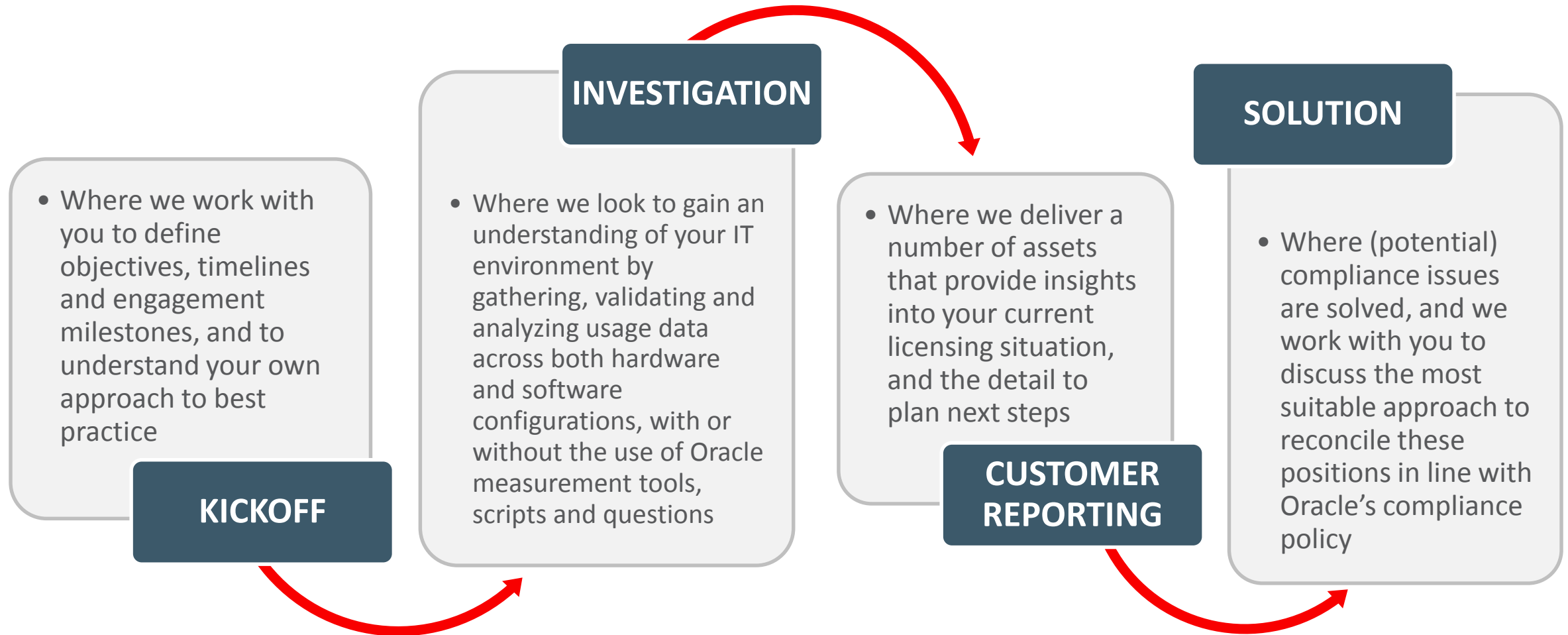
“Our Oracle License Management Services asset management engagement was well planned, carefully structured, and professionally delivered. We are now in a much stronger position to improve our global software management processes and to drive down costs.”

Fatima Hoff, License Compliance Manager, CEVA Logistics

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LMS Engagement Process

Engagement Process Overview



An overview of the license assessment process when working with LMS



Engagement Process Overview

1	KICK OFF	<ul style="list-style-type: none">• Explaining the process• Planning and defining the project's scope• Setting objectives, timelines, milestones• Agreeing project team members	where we work with you to define objectives, timelines and engagement milestones, and to understand your own approach to best practice
2	INVESTIGATION	<ul style="list-style-type: none">• Gathering and understanding customer IT environment information• Analysis and validation• Customer acknowledgement and understanding of details	where we look to gain an understanding of your IT environment by gathering, validating and analyzing usage data across both hardware and software configurations, with or without the use of Oracle measurement tools, scripts and questions
3	CUSTOMER REPORTING	<ul style="list-style-type: none">• Issuance of a report, verification letter or findings spreadsheet	where we deliver a number of assets that provide insights into your current licensing situation, and the detail to plan next steps
4	SOLUTION	<ul style="list-style-type: none">• Solve (potential) compliance issues in line with Oracle's compliance policy	where (potential) compliance issues are solved, and we work with you to discuss the most suitable approach to reconcile these positions in line with Oracle's compliance policy

Project Plan Example

Phase	Action	Steps
1. Kick-off	Notification Letter	<ul style="list-style-type: none"> • Issue notification letter to customer contacts
	Introductory Call	<ul style="list-style-type: none"> • Schedule within 3 -5 days of notification date • 30 - 45 minute call • Topics: Introduce LMS; discuss the engagement process/timeframe; determine key contacts
2. Investigation*	Oracle Server Worksheet (OSW)	<ul style="list-style-type: none"> • 1-2 weeks to complete from notification date • 45 -60 min follow up call to validate architecture; discuss questions and measurement tool
	Measurement (if applicable)	<ul style="list-style-type: none"> • Install tools/scripts within a few days of OSW call • Run tools/scripts – 1 to 2 weeks(or longer) depending on product
	Validate License Entitlement	<ul style="list-style-type: none"> • Validate your Oracle license entitlements
	Customer Findings Call (may require a few calls)	<ul style="list-style-type: none"> • Schedule upon delivery of measurement output • 30-60 minute call (LMS and Customer only) • Topics: confirm measurement output consists of entire environment; discuss questions
3. Reporting	Final Report	<ul style="list-style-type: none"> • Issue a written Final report
4. Solution	Findings & Conclusion Call (may require a few calls)	<ul style="list-style-type: none"> • Schedule upon delivery of Final Report • 30-60 minute call • Topics: walk through Final report; discuss findings and resolution if compliance issues are found

**Customer time is needed in running the measurement and confirming data.*

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LMS Portfolio

How Do We Complement Sales

Independent, best practice advice

Growth

- Sales aim to enhance your business by knowing how the Oracle product portfolio can help you drive business efficiencies and growth

Transparency

- LMS aim to give you greater visibility of your Oracle deployment and usage providing a clear foundation for business efficiencies and transparency

Working to provide the best for the customer

Our Service Offerings

What you get from LMS

Advisory
Services

True Up
Services

Audit
Services

Contract
Certification
Services

Reducing Complexity

How LMS can help:

Proactive compliance	Meaningful insights	Better decisions	Greater efficiency
To help you manage your licenses to effectively remove the risk of non-compliance	To provide visibility into your deployed estate to reduce inefficiency, duplication and redundancy	To deliver a more centralised and coordinated view of your Oracle estate	To establish the first step in developing greater transparency into your IT investments

LMS Services Explained

Advisory Services	True Up Services	Audit Services	Managed Services
<p>Assist customer with guidance relating to Oracle licensing, such as:</p> <ul style="list-style-type: none">• Clarification of license terms within the customer's contract• Advice on licensing policies for a specific Oracle Product• Education on Oracle license policies for partitioned environments <p>This could relate to current license entitlements or future licensing needs</p>	<p>Assist customer with request for understanding current architecture license deployment with tailored procedures to meet the goal.</p> <ul style="list-style-type: none">• Sales request for assistance to provide assessment of current architecture license deployment• LMS proactively approach customer to provide assistance on current architecture to help assess usage• Not referencing audit rights but compliance must be resolved	<p>Compliance validation assessment to reconcile the number of licenses versus usage. Should include:</p> <ul style="list-style-type: none">• Thorough understanding of the contractual licenses• Investigation and verification of deployment of Oracle Programs• Analysis and conclusion of compliance findings	<p>Typically aimed at large/strategic customers.</p> <ul style="list-style-type: none">• Provide assistance and expertise in the utilization and risk management of Enterprise Agreements as well as assessment of asset management practices



Service Elements

Advisory Services	True Up Services	Audit Services	Managed Services
<p>Advisory Services provide guidance in relation to a specific licensing question.</p> <p>Advisory Services do not include factual verification through measurement. Nor do Advisory Services include a comparison between license entitlement and usage</p>	<p>True Up is a customer centric approach based on customer interviews and discussion that provides the customer with license recommendations and knowledge of their deployment of Oracle Programs.</p> <ul style="list-style-type: none">•Can be initiated when the contract does not give Oracle the audit right•Can be performed with or without measurement - a non-technical assessment of usage or verification of usage is sufficient	<p>Audit Services is a process driven approach that includes factual verification of the customer's usage.</p> <p>This can be done not only through measurement tools, but also through substantive testing of customer data, verification of records, etc.</p>	<p>ULA/Pool of Funds: Validation of current deployment and/or assessment of future utilization potential of Oracle programs associated with ULA agreements.</p> <p>Expansion & Campus: Facilitation with the Customer's management of reporting requirements associated with Enterprise agreements, e.g. Expansions and Campus agreements</p>

Analysis and Technical Tools

Advisory Services	True Up Services	Audit Services	Managed Services
<p>Assistance is limited to guidance on licensing only</p> <p>The service may include a licensing presentation or whiteboarding session for the customer's education related to their specific question</p>	<p>Can be discussion based but can leverage existing LMS skills and (where agreed) tools:</p> <ul style="list-style-type: none"> -OSW -Questionnaire -LIR <ul style="list-style-type: none"> •Could utilize customer's own measurement tools and usage reports if these validated by LMS •Whether technical tools are used or not a documented output of the findings and any resolution is required •Utilize LMS Web Portal for data collection/engagement execution 	<p>Will involve a verification of usage. LMS tools available to gather usage data: (OSW, Questionnaire, OMT, etc.)</p> <p>In some cases, technical tools will not be used to help verify usage. Whether technical or non-technical, a determination of usage and comparison analysis to license grant will be used to draw a compliance statement</p>	<p>AMS: Review of asset management questionnaire and substantive testing to validate existence and effectiveness of controls represented by customer personnel</p> <p>ULA: Collection and assessment of current deployment data and/or future utilization requirements. Technical tools might be used to verify deployment</p> <p>PeopleSoft, Campus: Review of information certified by the customer against their Enterprise reporting clause</p>

Next Steps

Get in touch

Thank you for your time.

**To begin the conversation,
contact us at
[kersten.penni @oracle.com](mailto:kersten.penni@oracle.com)
or visit at oracle.com/goto/lms**

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